



Training Document

How Do I ...

Setup and use the Sugar Plug-in for Microsoft Outlook

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SugarCRM Outlook Plugin

1.1 Introduction

The Sugar Plug-in for Microsoft Outlook provides Sugar users with the ability to perform the following actions:

Synchronise contacts, appointments, and tasks between Outlook and Sugar.

Archive email items from Outlook with Sugar accounts, bugs, cases, contacts, leads, opportunities, and projects.

View Sugar records from within Outlook.

Create Sugar accounts, bugs, cases, contacts, leads, and opportunities.

Multiple versions of Sugar Plug-in for Microsoft Outlook on different computers can access the same Sugar server instance. A client can run only one version of the plug-in.

1.2 Installation Prerequisites

The 5.1 version of the Sugar Plug-in for Microsoft Outlook requires Sugar version 5.1.

Install the latest version of Sugar on your server environment and note the URL to the application.

You will need it later in the installation. The format of the URL is http://server_instance/index.php.

Your server_instance identifies your specific instance of Sugar.

You can view your server's URL in the User Settings panel of your My Accounts screen in Sugar.

It is recommended that you uninstall any previous versions of Sugar Plug-in for Microsoft Outlook before you install the latest version.

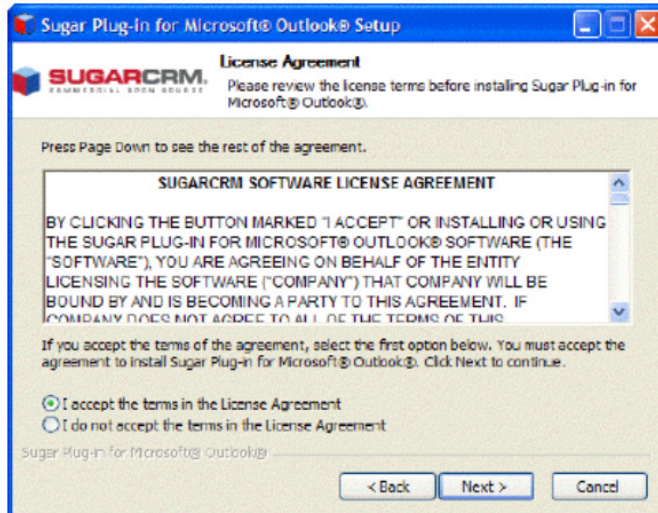
To uninstall previous version of Outlook Plug-in for Microsoft Outlook

1. Close the Outlook client and any Outlook-related windows and programs.
2. From the Windows Start button select Control Panel, then Add/Remove Programs.
3. From the Add or Remove Programs window select the Sugar Plug-in for Microsoft Outlook item, and then select the **Change/Remove** button.
4. Follow the instructions that the Uninstall Wizard provides to remove the previous version.

Note: If the free trial version of Outlook Plug-in is already installed on your machine, you can upgrade to the full version of Outlook Plug-in instead of performing a fresh install.

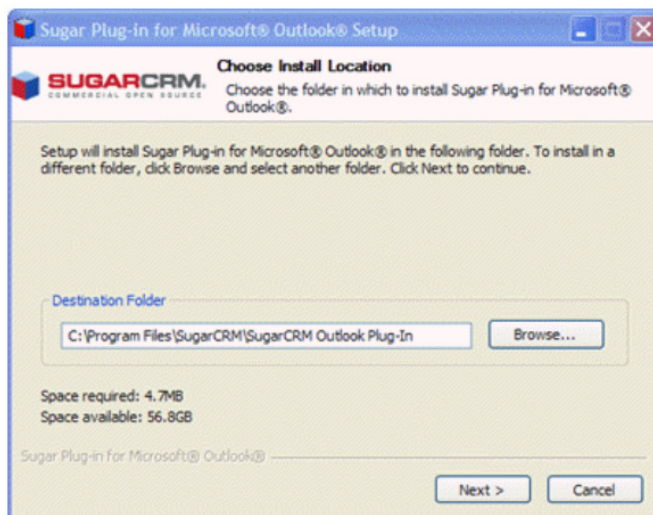
1.3 Installing the Sugar Plug-in for Microsoft Outlook

1. Navigate to the location of Sugar_OutlookPlugin.exe for 5.1 and run it. The Setup Wizard page displays on the screen.
2. Click Next. The License Agreement displays on the screen.



3. Select "I accept" and click Next.

The Choose Install Location page displays on the screen. This page identifies the location where the Sugar Plug-in will be installed on your PC. You can leave the default location, or browse to select an alternate location.

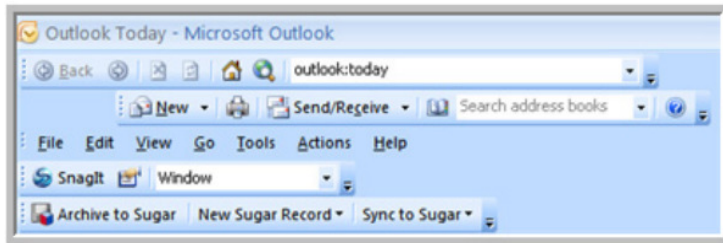


4. Click Next.
The installation process begins. When the installation completes, the Installer displays a message stating that the plug-in has been successfully installed. You will need to restart Microsoft Outlook to view the SugarOutlook menu.

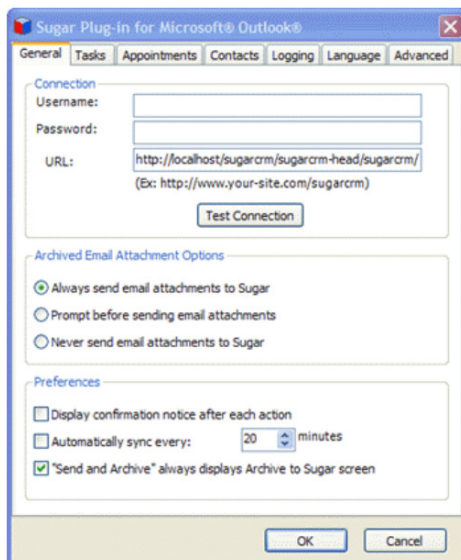
1.4 Configuring the Sugar Plug-in for Microsoft Outlook

1. Launch Microsoft Outlook.

The Sugar toolbar displays directly beneath the standard toolbar

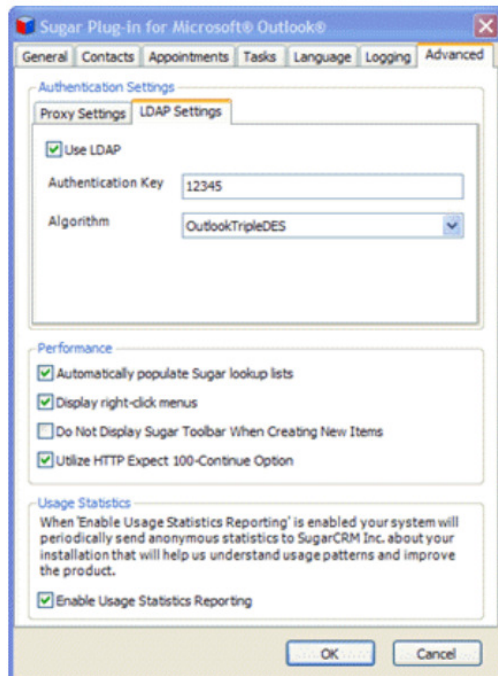


2. Navigate to Tools > Sugar Options to access the Sugar Plug-in for Microsoft Outlook configuration dialog box shown below.



3. In the Connection section, enter your Sugar username and password. This is the username and password of the Sugar user for whom Contact and Calendar synchronisation will occur and for whom Outlook email items are archived. Enter the same values as you would use to log into Sugar.
4. In the URL field, specify the URL of your Sugar Server instance – http://localhost/sugarcrm in our example.
5. Use the Test Settings button to verify your settings. If the settings are correct, the Test Results dialog box displays a message confirming that login was successful.

6. If your administrator sent you an encryption key for LDAP authentication, select the Advanced tab, select the Use LDAP box, and enter the encryption key in the Authentication Key field. Outlook uses this key to encrypt your passwords.



Note: When you log into the SugarOutlook again, your encrypted password will display on the screen for security reasons. If you want to test the connections again, you will need to reenter your original password.

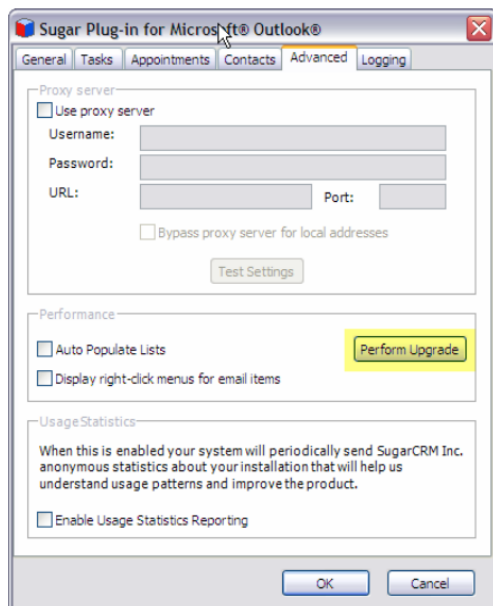
7. Press **OK** to close the dialog box and return to Outlook.

Upgrading the Sugar Plug-in for Microsoft Outlook

When you install Sugar Plug-in for Microsoft Outlook 5.1, you will be able to access the plug-in normally as there are no upgrade steps that are performed at this time. You can archive emails and create Sugar records using the new Plug-in.

The upgrade occurs when you first attempt to use the Mark for Sync option or when you perform a synchronisation and click OK. When the upgrade is complete, a message confirming the upgrade displays on the page.

The Tools > Sugar Settings screen displays a Perform Upgrade button that you can use to immediately begin this process. This button will not appear after the upgrade finishes.:



You can revert to an earlier version of the plug-in by uninstalling version 5.1 and reinstalling the earlier version. You must synchronise before switching versions.

Sugar Plug-in for Microsoft Outlook 5.1 requires a 5.1 or higher version of the Sugar server. A pre-5.1 version of the plug-in can run without modification on a 5.1 version of Sugar.

All Contacts and Appointment items that were eligible for synchronisation before the upgrade can be synchronised after the upgrade.

Additionally, the pre-5.1 plug-in installation creates a new field in Outlook Calendar (Appointment) items called "AppID" to store Sugar records IDs corresponding to Sugar Call or Meeting records. To differentiate an Outlook Appointment between Sugar Calls and Meetings, an "AppType" field stores an appropriate flag.

The 5.1 upgrade process retrieves the ContactID, AppID, and AppType values and creates corresponding entries in a database that resides on the client machine.

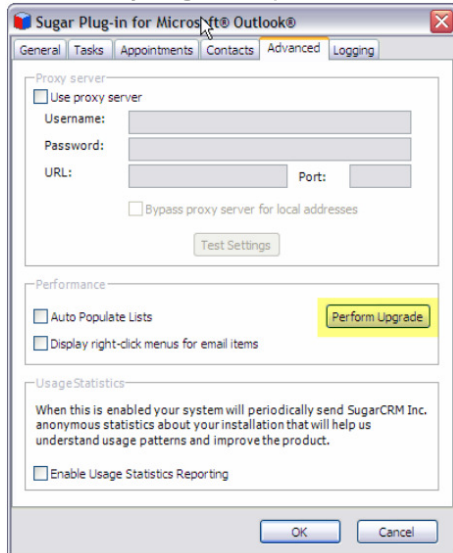
After you install Sugar Plug-in for Microsoft Outlook 5.1 and perform the upgrade, the SugarView and the columns noted above will remain but they are ignored. You can remove them at any time.

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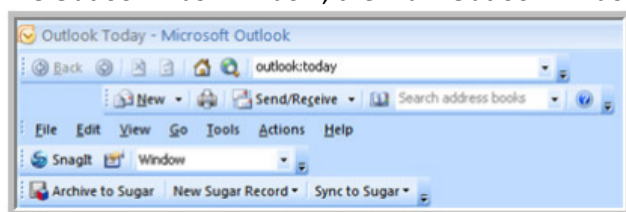
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Using the Sugar Plug-in for Microsoft Outlook

This section describes the plug-in’s toolbar options and the various tasks that you can perform using the Sugar Plug-in for Microsoft Outlook.

1.5 Toolbar Options

The Outlook Inbox window, the main Outlook window, contains the main Sugar toolbar.

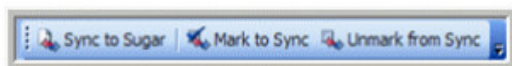


Archive to Sugar is used to allow one or more Outlook email items to be archived to one or more Sugar records.

New Sugar Record allows the creation of new Sugar accounts, bugs, cases, contacts, leads, and opportunity records.

Sync to Sugar is used for synchronise Outlook appointments, contacts and tasks with corresponding Sugar meetings and calls, contacts and tasks.

In Outlook Contact, Appointment, and Task windows you will find the following toolbar::



Sync to Sugar performs a synchronisation of the current Outlook item type with the corresponding Sugar module.

Mark to Sync is used to designate items that will participate in the next synchronisation.

Unmark from Sync allows you to discontinue the synchronisation of selected items. The items remain in both Sugar and Outlook.

When you compose a new email in Outlook you can make use of the following toolbar:



Send and Archive allows you to send and archive in one easy step.

Lookup Sugar Addresses allows you to select Sugar contact email addresses to include in the To, CC, and BCC address fields.

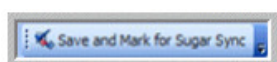
Creating a new Outlook Contact provides the following toolbar options:



Save and Mark for Sugar Sync provides a convenient way to save the contact and have that person participate in the next contact synchronisation.

Set Company to Sugar Account enables you to pre-populate an Outlook Contact's Company field with a Sugar Account name. Also, in the event the Outlook Contact is synchronised, this ensures a direct linkage between the resulting Sugar Contact and the corresponding Sugar Account.

Creating a new appointment or task also displays the following toolbar option:



Save and Mark for Sugar Sync provides a convenient way to save the appointment or task and have that contact participate in the next synchronisation.

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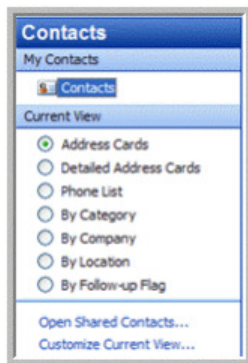
1.6 Synchronising Contacts

The Sugar Plug-in for Microsoft Outlook allows you to synchronise Outlook and Sugar contacts. Changes made to contacts in either system are reflected in the other system after synchronisation.

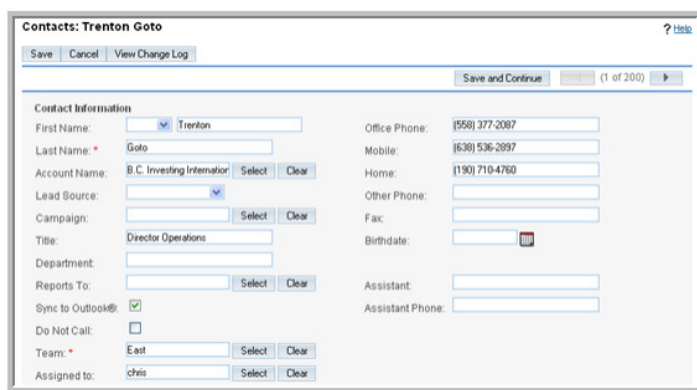
1. To begin synchronising contacts:

In Outlook, navigate to Go > Contacts and in the Contacts window, click the Sync to Sugar button.

2. Select Contacts from the Contacts panel on the left.



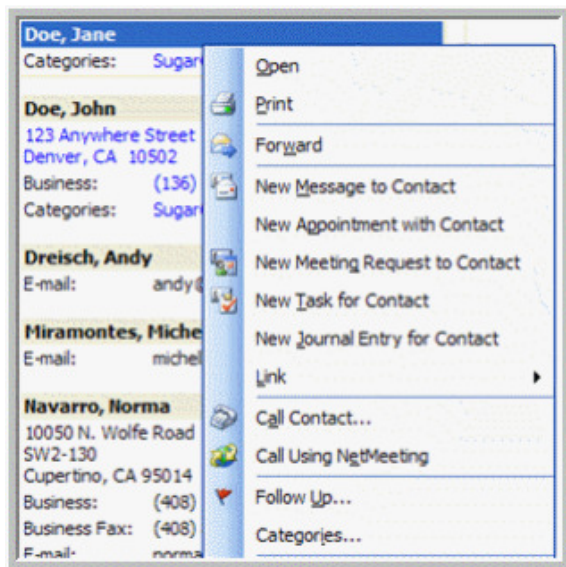
During the synchronisation process a dialog box displays a count of records processed. At the end of the process the dialog box closes and the synchronisation is complete. While the synchronisation is processing you can use Outlook normally. Sugar Contacts that are visible to the Outlook user are eligible for synchronisation but only Sugar Contacts with the Sync to Outlook checkbox set are synchronised.



Similarly, only Outlook contacts that you have marked for synchronisation through the Mark for Sync command will synchronise. When you mark an Outlook Contact to synchronisation, Sugar Plug-in for Microsoft Outlook will add "SugarCRM" to the category of the item. You cannot synchronise Outlook contacts on which the "Private" flag is set.

Note: The "SugarCRM" category value is only a visual aid; Sugar Plug-in for Microsoft Outlook maintains an internal database of items marked for sync.

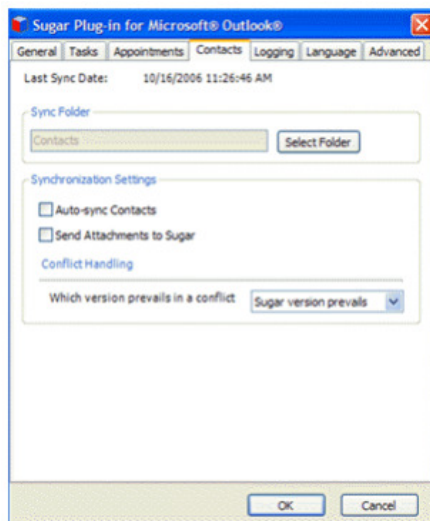
You can view an item's categories by right-clicking on the item and choosing the Categories menu item as shown below.



Exposing the Categories field in Outlook contact views is a convenient way to identify contacts that participate in synchronisation. Initially, no contacts are designated for synchronisation after installing Sugar Plug-in for Microsoft Outlook for the first time.

Handling Conflicts

A conflict occurs when a contact is modified in both Sugar and Outlook some time after the last synchronisation. Settings in Tools > Sugar Options govern conflict handling behavior. You can elect to have the Sugar version prevail, the Outlook version, or prompt the user to choose.



Deleting Contacts

In Sugar Plug-in for Microsoft Outlook, the Sugar version of a contact record supersedes in importance an equivalent contact in Outlook. This is because the contact has a greater role in the

organisation through Sugar than with any given individual using Outlook. Therefore, if you delete a contact in Outlook that has been synchronised with Sugar, the contact will remain in Sugar and its “Sync to Outlook” checkbox will be cleared. However, when you delete a contact in Sugar, the contact is also deleted in Outlook.

Setting a synchronised contact to Unmark for Sync (in Outlook) or clearing the “Sync to Outlook” checkbox in Sugar has the effect of suspending further synchronisations – both Outlook and Sugar will retain their respective contact records and the flags will be set equivalently via the sync operation. Changes to the contact in either system will not be reflected by the other system. If you later re-enable the Mark for Sync or Sync to Outlook flags then synchronisation will resume.

Resolving Duplicate Contacts

To prevent inadvertent contact duplication, Sugar Plug-in for Microsoft Outlook performs a lookup during synchronisation and then binds the resulting contacts, or creates new contacts if not found.

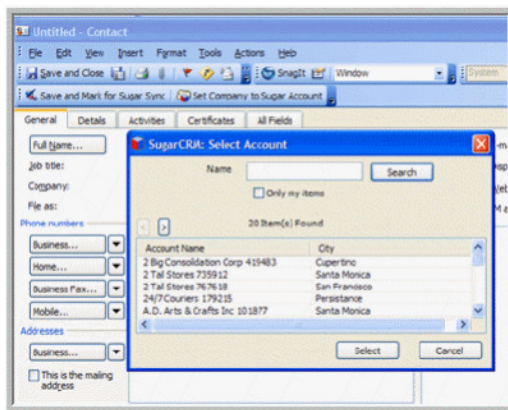
For example, you create a contact in Outlook that is already accessible to you in Sugar with the name “Betty Boop” and an email address of betty@boop.com. When you set this contact’s Mark for Sync flag in Outlook, Sugar Plug-in for Microsoft Outlook detects that this is a new contact from a synchronisation perspective. In this case the plug-in will attempt to bind the Outlook contact with a Sugar contact. The combination of the contact’s email address and first and last name is used. If no matches are found a new contact is created on the Sugar side; otherwise, the Sync to Outlook flag is set on the Sugar side for the contact matching the search.

The same process is used when a Sugar contact is changed to Sync to Outlook and the contact already exists in Outlook.

Contacts and Sugar Accounts

When a contact is synchronised with Sugar, the plug-in will perform a lookup of Sugar accounts using the value stored in the Outlook’s Company Name field. If there is an exact match, the Sugar contact will directly reference the account that was found.

Sugar Plug-in for Microsoft Outlook provides a convenient way to ensure that synchronised contacts maintain their relationship with Sugar accounts. When in the Outlook Contact form, click Set Company to Sugar Account to perform a lookup of Sugar account names.



A similar mechanism is used for Sugar contacts you create using the New Sugar Record button to link to a new Sugar record.

Synchronising Your Calendar

Sugar calls and meetings that are visible to the Outlook user are eligible for synchronisation. From these, only calls and meetings that the user has organised or has been invited to are synchronised to Outlook as appointment items. Outlook calendar items for which the Mark for Sync option has been selected will synchronise. Outlook Calendar items with the Private flag set will not participate in synchronisation.

1. To begin synchronising the calendar:
2. Click Sync to Sugar in the Outlook Calendar window
 Select Appointments from the Sync to Sugar option in the main toolbar.

During the synchronisation process a dialog box displays a count of records processed. After the process ends, the dialog box closes and the synchronisation is complete. While the synchronisation is processing you can use Outlook normally.

Synchronising Tasks

Tasks in Sugar that are visible to the Outlook user are eligible for synchronisation. From these, only tasks that are assigned to the user are synchronised to Outlook.

To begin synchronising tasks:

1. Click Sync to Sugar in the Outlook Task window.
2. Select Tasks from the main toolbar Sync to Sugar option:

During the synchronisation process, a dialog box displays a count of records processed. At the end of the process the dialog box closes and the synchronisation is complete. While the synchronisation is processing you can use Outlook normally.

Only Outlook task items for which the Mark for Sync option has been selected will be synchronised. Outlook Task items with the Private flag set cannot be synchronised.

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Archiving Emails

The Sugar Plug-in for Microsoft Outlook provides a convenient way to archive Outlook emails and associate them with any of the following Sugar modules:

- Accounts
- Bugs
- Cases
- Contacts
- Leads
- Opportunities
- Projects

Any Outlook email item can be archived to Sugar records, providing a powerful means of recording important customer interactions.

There are two ways an email can be archived:

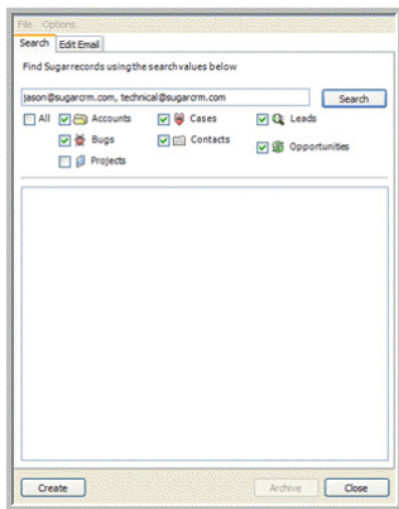
1. When composing the email
2. By selecting from the list of existing emails

Composing and Archiving Emails

Sugar Plug-in for Microsoft Outlook allows you to send and archive emails in one easy step. When you have finished composing an email, click Send and Archive to begin the process. Sugar first invokes the normal Outlook Send function and then archives it in Sugar.

The archive step can be configured to your preferences by adjusting the Send and Archive to display Archive to Sugar screen setting in Tools > Sugar Options. When this flag is set, the plug-in will unconditionally display the Archive Email to Sugar screen after the email is sent, allowing you to find the appropriate Sugar records to which the new email is archived.

The Archive Email to Sugar screen is shown below and is described in detail later.



To allow for quick archival of emails to a single recipient, clearing the Send and Archive displays Archive to Sugar screen setting in Tools > Options. Then, if a new email consists of a single recipient, the plug-in will attempt to find the Sugar contact or lead (in that order) that matches that email address. If a single Sugar contact or lead is found, then the email is archived immediately with no further interaction.

However, if a single match cannot be found or if the email is addressed to multiple recipients, Sugar Plug-in for Microsoft Outlook will display the Archive Email to Sugar screen. This behavior is summarized below:

Send and Archive display Archive to Sugar screen flag	A single recipient	Recipient found in Sugar	Action Performed after email sent
Checked	Yes or no	Yes or no	Display Archive Emails screen
Not checked	Yes	Yes	Archive immediately
Not checked	No	Yes or no	Display Archive Emails screen
Not checked	Yes	No	Display Archive Emails screen

Archiving Existing Emails

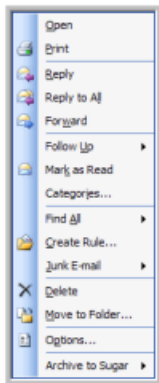
Sugar Plug-in for Microsoft Outlook provides for the convenient archival of existing email items. You can archive a single email or multiple emails in one archive step. Any number of Sugar items, including items from different modules, can be the target of the archival process.

You can immediately archive an email to a Sugar Contact or Lead identified by the To email address. Simply right-click the email item and choose the Archive to SugarCRM option. In the example below the To address matches a Sugar contact. Simply select the appropriate item and the archival takes place immediately.

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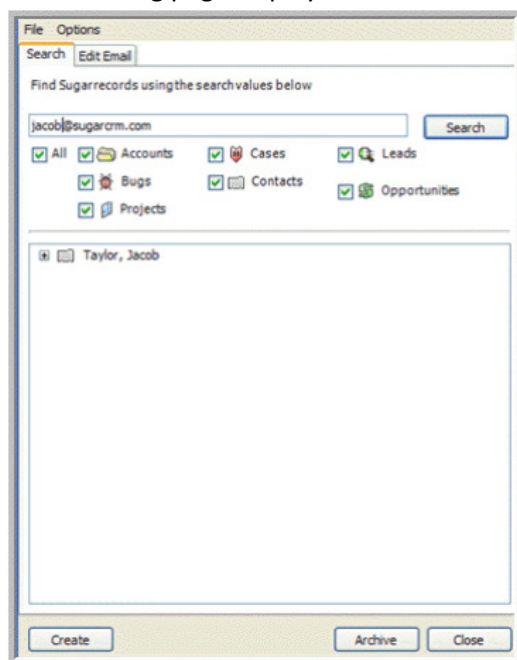
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You may sometimes need to be more selective in determining the Sugar items to archive to. You may also need to archive to multiple Sugar items at one time or edit the email before it is archived in Sugar. For these reasons, you should use the Archive to Sugar option.

With the cursor positioned on an Outlook email item, click the Archive to Sugar button on the toolbar to initiate the archive process.

The following page displays on the screen:



Several actions occur prior to the screen appearing. First, the Search field is populated for reference with the email address or addresses found in the current email To and CC fields.

Secondly, the Sugar modules identified by the checkboxes below the search field are scanned for matches. In this case we matched a single Sugar Contact using the email address of the selected email.

For the purposes of illustration, the contact item has been expanded to reveal other Sugar modules associated with the contact.

Archiving Outlook Email with Existing Contacts and Leads

At this point, the email can be immediately associated with the highlighted item by clicking Archive. This action immediately creates a History record in Sugar that stores the email correspondence for the selected item. You can choose multiple Sugar items and the email will be archived to each in turn.

Selecting the Edit tab prior to clicking Archive gives you the opportunity to alter the contents of the email prior to storing the email correspondence as a History item in Sugar. This allows you to augment the current email with comments. Any changes that you make here will not alter the Outlook email. Alternatively, you can select one or multiple Outlook emails and drag-drop them onto a Sugar item listed in the Archive Email to Sugar screen.

To provide for repeated archival steps involving multiple combinations of emails and Sugar items, like catching up with emails at the end of the day, the Archive Email to Sugar screen dialog box is always in the forefront. You can change this by modifying the setting in the Options menu.

Archiving Outlook Email with Existing Sugar Records

If you wish to associate an email with Sugar records, you must first identify the appropriate records. For example, to associate the current email with an account named 'SugarCRM', you will need to clear the Search field and enter the leading characters of the account name. (Ensure that the Accounts checkbox is set.)

Records matching the search criteria, including account records, are displayed in the list box. Select the appropriate record and click Archive. The email is immediately archived to the account you choose.

You may search for records from multiple Sugar modules and archive emails to any combination of Sugar items.

Archiving Outlook Email with New Sugar Records

- Sugar Plug-in for Microsoft Outlook provides a convenient method to create new Sugar records. This is helpful when you wish to begin collecting important correspondence for records which may not currently exist in Sugar.

For example, to create an account in which to associate the current email, do the following:

- Click Create and a dialog appears allowing you to specify account field values.

- Click Create and Close to save the account record. A Sugar account record is immediately created.
- Then, use the methods described previously to associate the current email with the new account record, which now appears among the Sugar items.

Determining Which Email Items have been Archived

Sugar Plug-in for Microsoft Outlook makes it easy to tell that an Outlook email item has been archived to Sugar.

First, the item's Category field value is set to "SugarCRM". You can view an email item's category by right-clicking the item and choosing Options. Additionally, the item displays the date and time of the archival in the message status area.

Finally, the flag status of the item is updated if there is no flag already placed on the item.



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